EPDA PROCESS
2023-2024

Employee Professional Development Account (EPDA)

NAIT will contribute $800.00 per year (prorated for part-time staff) to a maximum of $3200 into an individual Employee Professional Development Account (EPDA) for each staff member. (Article 24 of the NAIT/NASA Collective Agreement).

Article 24.02 (b) states the responsibility for utilization of the $800 is subject to approval by program leadership and Department Head to ensure alignment and consistency with Article 24.01.

Effective July 1, 2022, EPDA will be administered by the NAIT's Account Payable. It is NAIT funded; therefore, **expenses must be in accordance with NAIT guidelines.**

Funding can be used to participate in courses, programs, conferences, seminars and workshops. Educational Resources is defined as the purchase of subscriptions to professional journals, educational software, educational materials, reference material, textbooks or tools that directly support professional development.

In addition, the payment of professional membership fees or membership in a union (non-working dues) directly related to the staff member's employment related development of skills, knowledge, and competencies, not otherwise covered under Article 34.

EPDA Account Balances

Please email John Mah, NAIT Account Payable at jmah@nait.ca for EPDA account balance and the status of online expense claim submission. You can also email Adèle Weichel at adelew@nait.ca for EPDA account balances, application form and process for submitting claims online.

There are a variety of avenues for academic members to receive professional development funding.

1)   **Program/School/Institute Funding**

If the program is providing funding to cover the entire cost complete the NAIT Travel Authorization and include a breakdown of all expenses. Submit the form for approval according to NAIT Guidelines. As per the Collective Agreement any professional activity that is required by the program shall be funded exclusively by the program. **Note: Expenses must be in accordance with NAIT guidelines.** Travel forms can be found on the NAIT website under eforms.

2)   Employee Professional Development Account (Article 24.02(c) of the Collective Agreement)

Confirm your EPDA funding amount by emailing John Mah at jmah@nait.ca or Adèle Weichel at adelew@nait.ca.

If you have EPDA funding available to cover the entire cost complete the EPDA Application form.

Submit to your Supervisor to sign off for relevancy and time off from work to attend. Once this form is signed you can register, pay, and attend the activity. Hold onto the EPDA Application form until you are ready to submit your claim through NAIT's Online Travel and Expense system.

NAIT

Learning Assignment, Education Material and Professional Membership Fee

| Reset Form |

Section A - Application *(completed by Staff Member)*

Employee Name _____   Employee ID _____

Program/Dept _____   Current Position _____

What is the benefit/relevancy of this Learning Assignment, Educational Material or Professional Membership Fee? *(max of 200 characters)*

☐ **Workshop/Conference/Seminar**

Title _____   Dates _____ to _____
                                                                        MM/DD/YYYY   MM/DD/YYYY

Location _____   Number of days Absent _____

			Costs			
Registration	Accommodation	Materials	Other	Food	Travel	**Total**
						$0.00

☐ **Educational Course i.e. Degree, Certificate**

Course Title _____   Dates _____ to _____
                                                                      MM/DD/YYYY   MM/DD/YYYY

Institution _____

Costs			Time off if applicable _____ to _____
Registration	Materials	**Total**	MM/DD/YYYY MM/DD/YYYY
		$0.00	

☐ **Educational Material** (Subscriptions to Professional Journals, Educational Software, Reference Material, Textbooks)

☐ **Professional Membership Fee** (Fees paid to a professional association not covered under Section 35 of the Agreement)

Description of Item *(max of 100 characters)*

Total Cost _____

Is this Application in conjunction with Program Funding? ☐ Yes ☐ No If Yes, amount _____

_____   _____
Applicant Signature   Date

Submit Application to the Work Unit Supervisor for authorization

----

Section B - Authorization

To be completed by Work Unit/Supervisor

Signature indicates that activity is relevant to the Program/NAIT initiatives and operation needs will be met allowing the staff member to engage in PD activity. Support does not imply full funding. ☐ Approved ☐ Denied

_____   _____
Work Unit/Supervisr Signature   Date

Application to be returned to Staff Member. If denied, attach rationale for denial and send a copy to NASA

Section C - Expense Claim

Scan and attach to the on-line Travel and Expenses process.

3)   Combined Sources of Funding

If you are using Program and EPDA funding, the process is a little complicated as it requires that both the EPDA application **and** NAIT's Travel Authorization forms be completed for each area. Outlined below is a sample of the steps required when seeking and claiming funding from both sources.

Filling out the Application Forms
a)   Complete the online NAIT Travel Authorization form showing all proposed expenses. Indicate by asterisks (*) if and where other funding is being applied for.
b)   Complete the EPDA Application form (Learning Assignment, Educational Material & Professional Membership Fee). Indicate at the bottom of Section A the amount of other funding being applied for.
c)   Ensure you **sign the EPDA Application form** as it authorizes the NASA Office to release your EPDA funds.
d)   Submit both the NAIT Travel Authorization and the EPDA Application form to your Supervisor's approval. Once approved, hold onto both forms until after the activity.
e)   After receiving approval from both funding areas, you may register, pay, and attend the activity.

Applying for EPDA Funds and Completing the NAIT's Online Travel and Expense Claim

Please use the following steps when completing and submitting to NAIT's Online Travel and Expense Claim. All forms along with the EPDA Application form are located on the NASA website.

1.   Confirm your EPDA funding amount by emailing John Mah at jmah@nait.ca or Adèle Weichel at adelew@nait.ca.

2.   To access the EPDA application forms, please review the NASA website to enable you to print off, complete, and sign the Application form. Ensure you **sign the EPDA Application form** and have your supervisor sign it. Purchase the item(s) or attend the event - keep your receipts as you will need to attach your completed EPDA application form and relevant documents to NAIT's Online Travel and Expense claim process.

3.   Please note when booking flights, you are encouraged to make reservations through NAIT's approved travel agency; however, you **cannot charge** your airfare expense to NAIT's account and/or the EPDA account as you are required to **pay for your own flights**.   Failure to comply with this request may result in the department program or you will be charged to pick up the expenditure due to not having sufficient EPDA funding to cover your expenses.

4.   To access NAIT's Online Travel and Expense Claim process you must go to your employee profile on the staff portal located on the NAIT staff network.

5.   To complete the online process, below are various screen shots (**Page 7**) of an expense claim when using EPDA funding. In order to ensure the expense is charged to EPDA, please insert the EPDA department ID **120306** or your individual department ID code if funding is not covered fully by EPDA funds and is being partially covered by your own department.

6.   Once again, prior to completing the claim, you will need to determine what funding amount is covered by EPDA and your department (if any) to eliminate it from being sent back for revision. Once you have determined the funding that is covered by EPDA and your department, then you will enter all the expenses and identify what portion is covered by EPDA (**120306**).

7. You will be required to scan and attach your EPDA application form, along with all your relevant documents pertaining to your claim. **"Attachments"** icon is located under the **"Default Location"** section.

8. If the claim is to be split between EPDA and your department, you will have to determine what amount is covered under each department ID.

    Once you have determined the amounts, you can then enter your expenses. However, in order to correctly allocate the amount to EPDA and department, you will need to select the line item under **accounting detail** which will you give access to reallocate the amount between EPDA (**120306**) and department expense codes. You must do this for each line item to ensure what appropriate funding amounts are allocated to EPDA (**120306**) and to the department.

    Per Diems and Incidental Allowance

    Meals and Incidental Expenses within Canada

    The meal allowances (per day) without receipts are:

    Breakfast: $15.00
    Lunch: $15.00
    Dinner: $30.00
    Incidental: $10.00

    Meals and Incidental Expenses outside of Canada

    The meal and incidental allowance for travel to the United States or other destinations are the same as in Canada except the amounts are converted into the currency of that country.

    This will be converted into Canadian funds at the conversion rates in effect at the time of travel. This can be computed from the actual rate paid for purchase of US dollars substantiated by a receipt, or rates as quoted on your credit card statements, or from a website such as http://www.bankofcanada.ca/en/rates/exchange.html

    Cash Advance Requests

    Cash Advance Requests are to be used only when travel expenses involve payment of flights. Conference registrations fees will only be reimbursed if the event corresponds with flights.

    Please ensure that you attach your EPDA application form and payment receipts to the Cash Advance Request. As per NAIT guidelines if you receive a cash advance then your claim should be submitted within 20 days following your return to work.

    Payment Process

    Once you submit your online expense claim, it will be reviewed by NAIT's Account Payable, and if no revisions are required, it will be forwarded to the HR designate.

    Accounts Payable will ensure the appropriate amount are charged to the correct budget accounts. Reimbursement will be by direct deposit.

EPDA Deadline Dates:

To further eliminate payment delays, and stay within NAIT's fiscal year (July 1st to June 30th), please be advised that all NAIT online travel and expense claims must be submitted using the following schedule:

Expenditure Dates:	Deadline Dates:
July 1st to September 30th	November 15th
October 1st to December 31st	January 15th
January 1st to March 31st	April 15th
April 1st to May 15th	June 1st
May 16th to June 15th	June 25th

Failure to comply with the above specified schedule may result in non-payment of expenses.

Steps for Creating an Expense Report

To Log into the Finance System, go to the NAIT Staff website and under your profile select the Online Travel & Expense link which will take you to the Finance page and select **Open**.
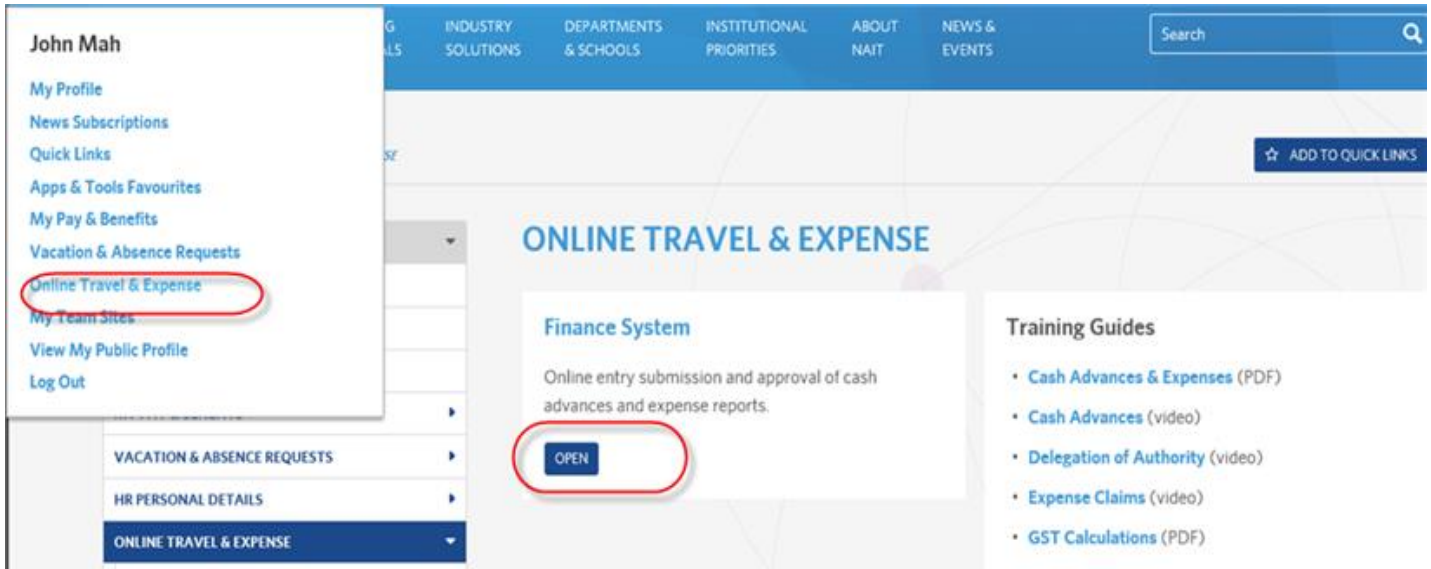
The upgraded system has a new look, and the screen shot below will show you how to access through the NavBar/Compass icon on the top right-hand corner of the laptop and/or computer screen. **(RED↓ down arrow).**

Please click the symbol and it will bring you to the next screen that is required to begin processing your claim. Once again, Pages 7 to 10 will be able to assist you in completing your claim.
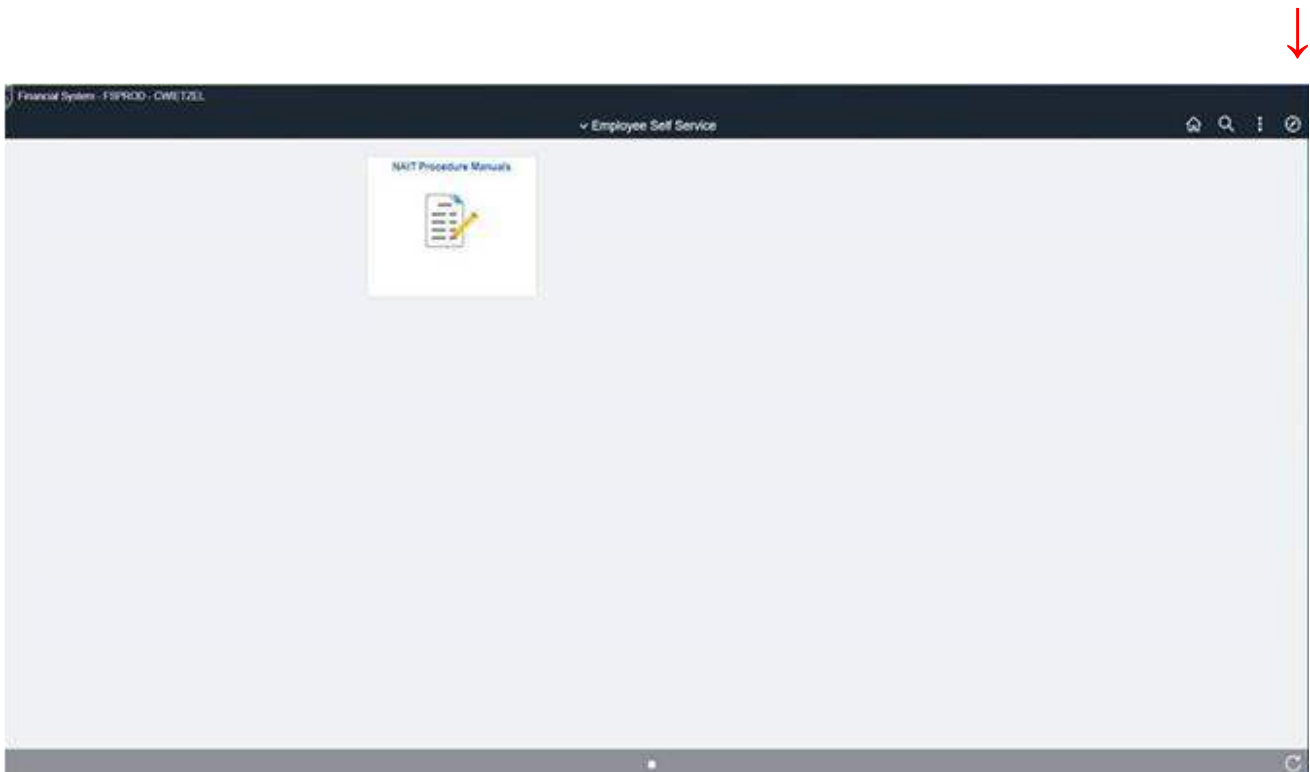
Once in the Finance System follow the link:

MAIN MENU>TRAVEL & EXPENSES>EXPENSE REPORT>CREATE/MODIFY

The first screen you will see illustrated below is to create a new expense claim in which it automatically selects the tab **"ADD A NEW VALUE"** icon. Your Empl ID number will instantly populate. Click on the **"Add"** icon which will create a new expense claim.

Fill in the required General Information fields illustrated below.

Field Name	Field description:
Business Purpose:	NASA-Emp Prof Dev Acct
Report Description:	High Level Description of Expense details
Reference:	Do Not Use
Default Location:	NAIT
Attachments:	Under the Default Location: Click the **"Attachments"** icon to include EPDA application form, payment receipts, travel authorization if required, and per diem details.

To change the accounting defaults for the entire claim at a header level, one expense line must be entered. (Illustrated on the next page.)

When one expense line has been entered, the Quick Start menu seen above changes to an Actions menu in the top right corner. You must enter the EPDA department ID code **120306** and there is no project code.

Enter expense information in the details section. **The Amount should include all taxes and be the total amount of the expense**. For those expense types that GST cannot be calculated by the system, the employee must enter it from the receipt. This amount should only reflect GST and not include HST or PST amounts. If there is no GST, please click **"No GST"**.

To save but not submit for approval, click on the **"Save for Later"** icon located on the top right-hand corner.

To submit for approval, click on **"Submit Expense Report"** icon located on the top right-hand corner.
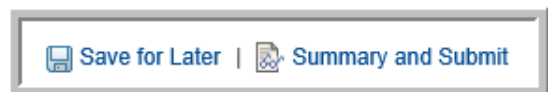
There is still another step on page 10 that you need to complete before your claim is finally successfully submitted.

The final step is that it will bring you to another page whereby you must **Check the Box** illustrated below and then click on **"Submit Expense Report"** icon.

Once your expense claim has been **"Saved for Later or Submitted"** a Report ID will be assigned to you and the approval workflow appears. Example:

Modify an Existing Report

Log into the Finance System, go to the NAIT Staff website and under your profile select the Online Travel & Expense link which will take you to the Finance page and select **Open**.

Once in the Finance System follow the link:

MAIN MENU>TRAVEL & EXPENSES>EXPENSE REPORT>CREATE/MODIFY

If an expense claim has been sent back to you for revision/correction you will need to click on **"Find an Existing Value"** icon in which you can either enter the **"Report ID"** or select **"Search"** icon to find any pending claim that have been sent back to you or claims that you have saved for later that are currently pending in your queue.

Select the claim to be modified and **read the comments** of those sent back as to what needs to be corrected and complete the revision and then resubmit the claim again.

Click on **"Find an Existing Value"** icon.
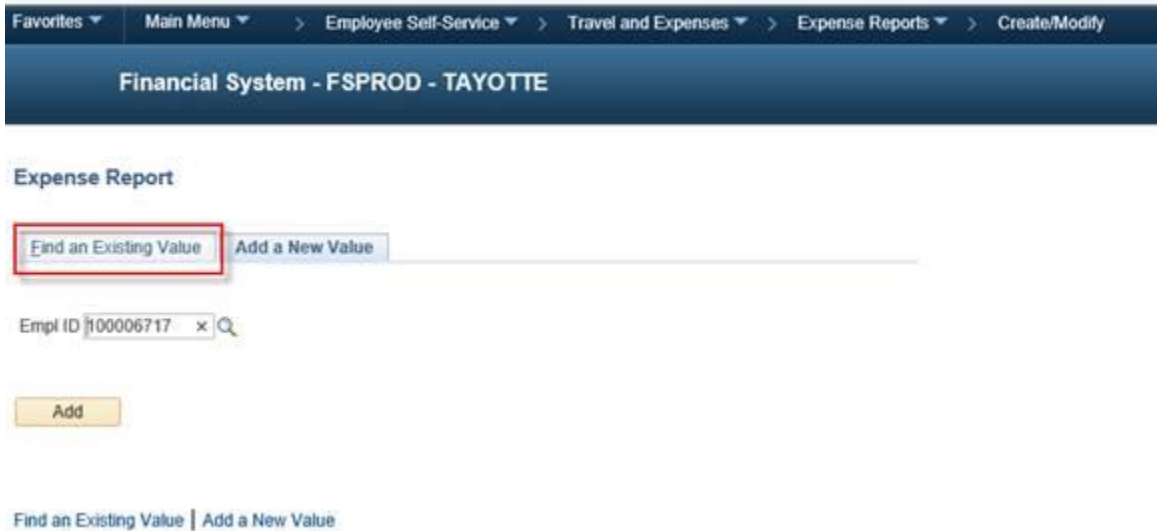
Enter your Report ID and click **"Search"** icon– this will bring up any expense reports available to be modified.

Do any modifications and then click on "Summary and Submit" – top right-hand corner.

It will bring you to another page whereby you must **"Check the Box"** illustrated below and then click on **"Submit Expense Report"** icon.

Completing Online Travel and Expense Claims using Remote VPN Access

If working remotely or on vacation, NASA members can submit an expense claim using the Remote VPN access link. (See below)

https://remote.nait.ca/global-protect/login.esp

How-To Guides

The "how-to" guides for employees and reviewers/supervisors/budget owners are located on the NASA website and your NAIT Staff Portal under Online Travel and Expense.

Travel and Expenses: Employee Entry

Please visit: https://www.naitacademicstaff.ca

                Click on Professional Development

                Click on Employee Professional Development Account

                Click on Travel & Expenses: Employee Entry